



CASE MANAGEMENT IN SETTLEMENT Experienced Workers

OCASI Professional Development Conference
October 18, 2007 / 9 to 12:00 pm

Facilitated by: Carolina Gajardo
www.costi.org

AGENDA



9:00/10:30

- WHO WE ARE & WHO DO WE SERVE?
- HOW DO WE WORK?
- WHO DO WE WORK WITH?

✓ 10:30 / 10:45 BREAK

10:45/12:00

- CASE MANAGEMENT
- BEST SERVICE PRACTICES
- CASE STUDY
- NOTES TO REMEMBER

What *is* culture? Here is one viewpoint.

- "Culture" refers to a group or community which shares common experiences that shape the way its members understand the world. It includes groups that we are born into, such as race, national origin, gender, class, or religion. It can also include a group we join or become part of. For example, it is possible to acquire a new culture by moving to a new country or region, by a change in our economic status, or by becoming disabled. When we think of culture this broadly we realize we all belong to many cultures at once.

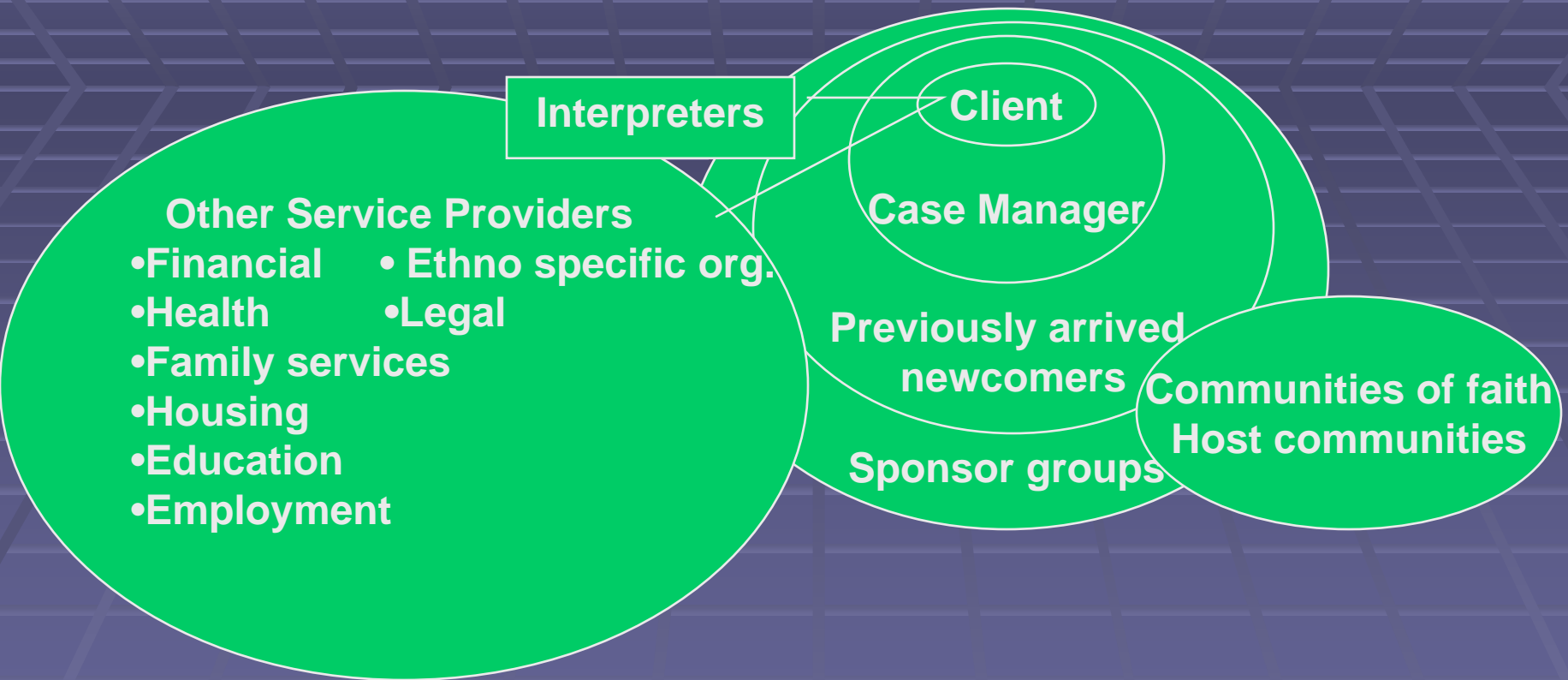
Differences between Refugees & Migrants

- Refugees do not choose to leave their homeland. They flee in response to a crisis. They have little choice about where they go and by what means they will travel.
- They have no time to pack or to distribute possessions. Almost everything is left behind.
- Refugees, due to their hurried, often secret departure, are unprepared emotionally for leaving, and may not have time to farewell loved ones.
- Refugees often flee without any documentation whatsoever.
- Migrants choose to leave their homeland and settle in a country of their choice.
- They arrange the most suitable method of travel and pack the possessions they wish to take.
- They can sell or dispose of possessions they don't wish to take.
- Migrants have time to prepare emotionally for their departure and to farewell friends and family appropriately.
- Migrants take with them their travel documents, passports, and other documentation, including educational qualifications.

Differences between Refugees & Migrants

- Refugees must often leave family members behind.
- Refugees, although they dream of returning home, know that this is unlikely to happen.
- Refugees arrive in their new country ill-prepared and often traumatized.
- They have little in the way of possessions and financial resources.
- They are often debilitated by a pervading sense of loss, grief, worry and guilt about the family left behind.
- Refugees may experience stigma and prejudice in their resettlement country in relation to cultural differences, disease prevalence, low education levels and perceived burdening of the welfare system.
- Migrants usually emigrate with their families.
- Migrants depart for their new country knowing that they can return to their homeland for visits, or return permanently if they cannot settle.
- Migrants are usually well prepared and well motivated to settle in a new country. Many will have found out about schools, employment and local conditions before they left their homeland.
- Migrants, due to their better levels of health, education and economic independence, are less likely to encounter negative attitudes in their resettlement country.

Circles of support



PARTNERS IN DIRECT SERVICE DELIVERY

1. Settlement Service Sector
CIC, Sponsors, Ethno-specific, interpreters, Host programs
2. Income Support Sector
Social Services – CIC (RAP, JAS), OW, ODSP, CPP, WSIB, Private Insurance
3. Housing Sector
Public Housing, Landlords, Shelters, Drop-ins', Housing Help centres
4. Legal Services
Community Legal Clinics, Legal Advocacy Organizations, Legal Aid, Lawyers
5. Health Sector
Public Health, Community Health Centres, Mental Health Programs
6. Family Services Sector
Child Protection Agencies; Family Support Programs; Multi-Service Agencies
7. Employment & Education sector
Employment & Training Centres, Schools, other educational institutions

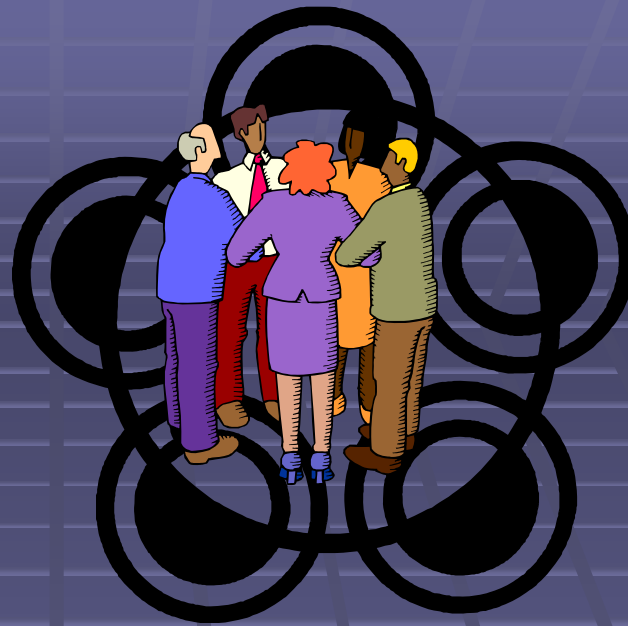
OTHER PARTNERS IN SERVICE DELIVERY

Internal

- Other programs
i.e. support groups,
special counselling,
volunteer, etc.
- Administration
- Technical support,
i.e. IT

Externals

- Funders
- Community
Associations
- Sister agencies
- Local community
organizations
- Business sector



CASE MANAGEMENT

Case manager: A professional who oversees the provision of a variety of specialized services to ensure that they are delivered in a fashion that represents an effective response to the whole problem.

Case services - Personal social services: meant to help those with personal maladjustments, problems, illness, or other difficulties.
(Social Work & Social Welfare in Canada)

Case Management

Ontario Settlement/ Guidelines/ ISAP Narrative Report/ Revised June 2005

Case Management is a service which **develops case plans** for the **evaluation and delivery** of settlement services. It involves assistance in **planning** and arranging for services; **assesses** the individual's needs; **coordinates** the delivery of needed services; ensures that services are obtained in accordance with the **case plan**; and **follows up and monitors** progress to ensure that services are having a beneficial impact on the individual. For the purpose of the ISAP program in the Ontario Region, case management is an approach to planning done by an agency settlement worker for the systematic delivery of a series of ISAP and other services, to a newcomer, over a period of time.

Employing case management to assist individual newcomers should be based on the **individual's needs** rather than routinely **applied to all newcomers** approaching an agency for services. Most newcomers would not require this rather intensive ongoing approach to meeting their settlement and integration needs.

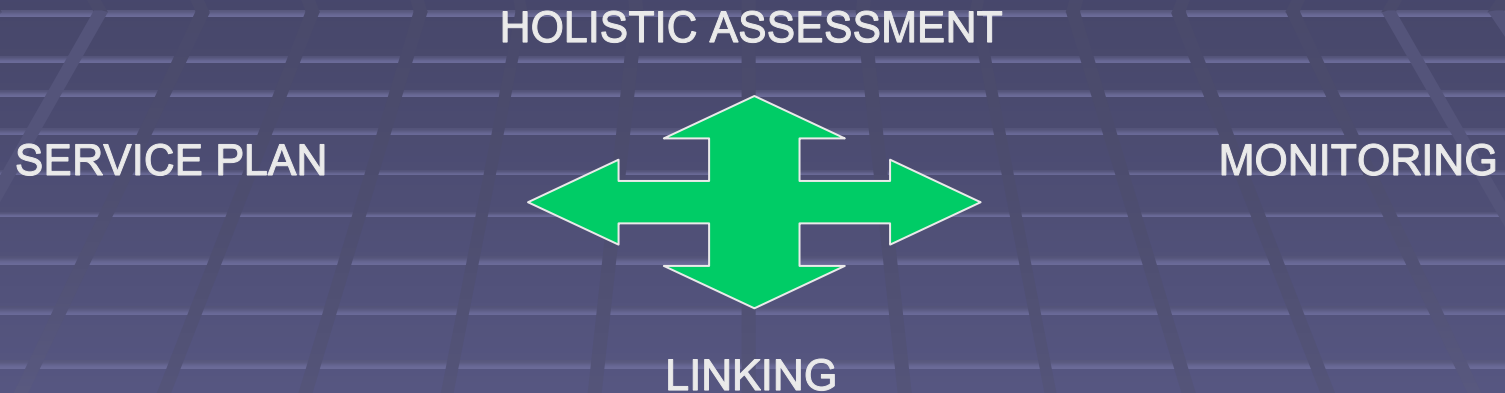
Services, supports, and programs would be **linked to newcomers' identified settlement needs**. The newcomers would be assisted in determining their strengths/needs and assisted in accessing the identified services within or outside of the settlement agency.

The process would be respectful of each individual and family served. Newcomers would be supported through the process of service negotiation which may include activities such as the case worker taking an active role in the appointments with other service providers or specialized workers assisting in making the appointments, and confirming that they are completed. Efforts would be made to ensure that newcomers could utilize and expand their formal and informal network of supports. Case managed newcomers and activities should be evaluated at regular intervals and upon closure of the case to ensure that positive results are being achieved.

Project Support and Monitoring: Follow up activities are understood as enquiries aimed to assess referrals, appropriateness of services provided and results achieved.

Service Bridging: Please refer to the definition in the contribution agreement. If more than one staff attends an event, please only count as one event.

CASE MANAGEMENT



DIRECT SERVICE: Assessment, development of service plan, supportive counselling, life skills, crisis intervention, etc.

MANAGERIAL FUNCTIONS : Include activities that link clients to appropriate services, supports and help networks. The worker is responsible for planning, negotiating, coordinating & monitoring the systematic delivery of services in a timely manner.

DEFINITIONS

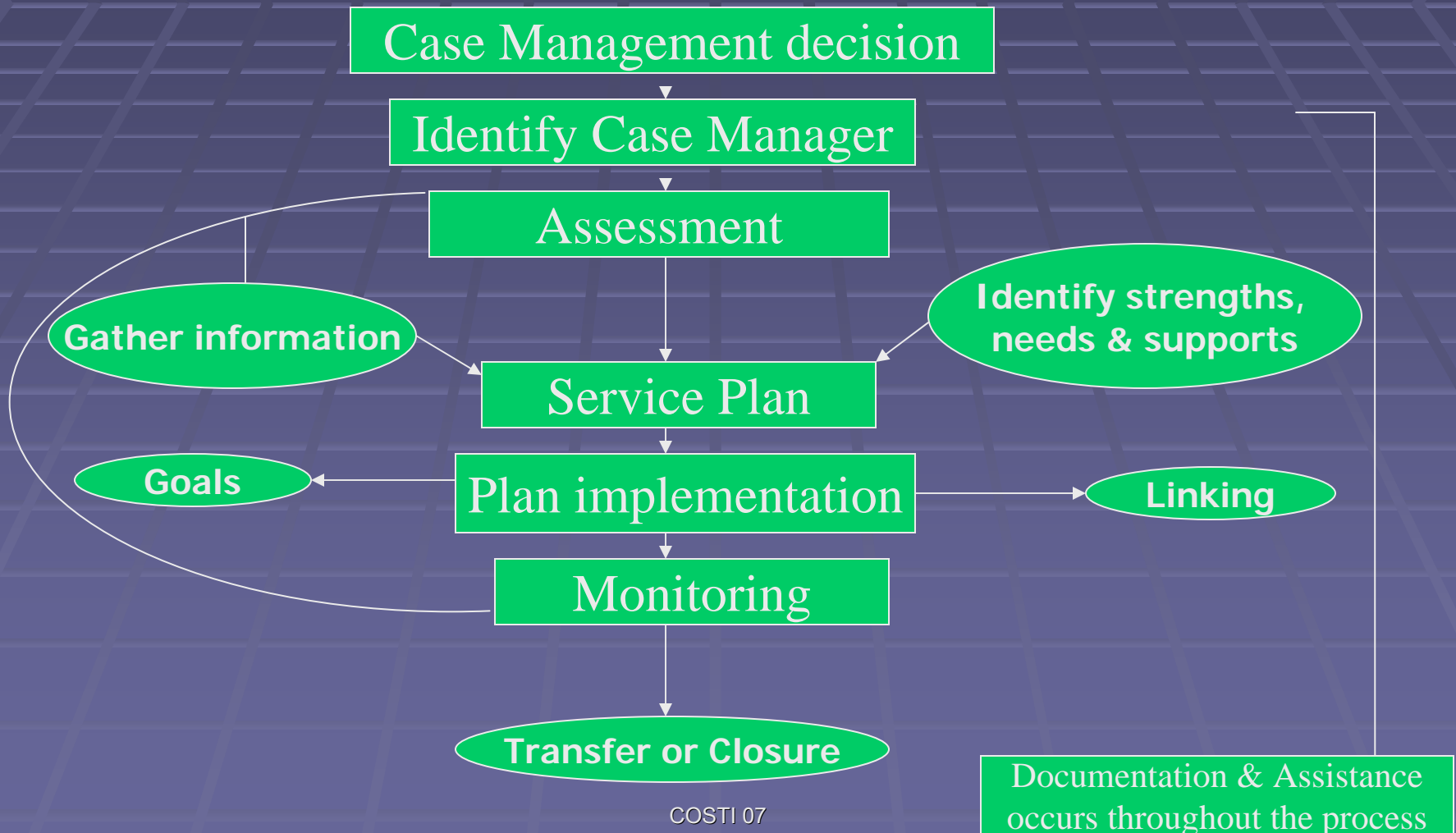
- **HOLISTIC ASSESSMENT:** Is the process of gathering, analyzing and synthesizing relevant information into a working definition of client issue(s) and/or need(s).
- **SERVICE PLANNING:** Once assessment is completed, a **Service Plan** is developed **WITH** the client to address multiple, interrelated needs. Goals are established.
- **LINKING:** Fundamental in a case management approach is the linking of the client to additional services, supports and help networks.
- **MONITORING:** Ongoing review and revision of assessment, service plan and linkages.

CASE MANAGER

QUALIFICATIONS

- Proven settlement experience working with newcomers, professionals, illiterate, victims of trauma, war, torture, persecution, abuse, mental health
- Training in case management and counselling
- Knowledge about Process of Adaptation and impact in family roles
- Demonstrated ability to advocate, liaises, mediate
- Knowledge of government and community resources
- Knowledge of international issues that impact refugees/immigrants
- Address client needs within a social justice framework acknowledging visible and invisible barriers

Case Management/Coordination process



IDEAL SUPPORTS, POLICIES & PROCEDURES

1. Effective intake process & Assessment
2. Procedures to channel incoming client work
3. Procedures to ensure workers have access to key information resources
4. Training Procedures

1. Policy Re Work Space
2. Client Follow-up Procedure
3. Procedure to Manage Flow of Case Work
4. Procedure For Information -Sharing Re: Best Practices
5. Need For A Supportive Work Environment
6. Procedure Re: Case Co-ordination

IDEAL SUPPORTS, POLICIES & PROCEDURES

Advocacy & Mediation

- Procedure Re: Working relationship with key referring Agencies
- Need for training in mediation

Community Education & Policy Development

- Policy Re: Educational workshops
- Procedure Re: Staff policy input
- Administration
- Automation policy

CASE STUDY

BACKGROUND:

- Newly arrived orphan refugee (18 years old), has lived for 5 years under the church care in an only male orphanage
- No formal education
- He suffers from mild deaf disability due to a bomb explosion

ACTIVITY:

- In your group brainstorm the necessary steps to put in place case management services for this client
- List all the necessary services that this individual will need to be in contact with
- Assess and provide an analysis of the organizational changes that in each of your services need to take place to implement case management services

BARRIERS to SETTLEMENT

Primary Barriers

- Skin colour ('race')
- Ethnicity/culture/religion
- Gender/sexual orientation
- Age
- Immigration status

Secondary Barriers

- Level of income
- Source of income
- Knowledge of the society & systems
- Language/accent
- Household type and size
- Knowledge of institutions and culture
- Experience with the dominant institutions and culture

Additional Barriers

- Earning capacity
- Capacity to search for information/resources independently
- Knowledge of rights & responsibilities as newcomers
- Capacity to meet requirements, i.e. references, employment record, health, other
- Ability to communicate
- Access to support
- Cultural view of new society
- Personality/Past traumas



DEFINING A SERVICE PLAN

- Identify priority issues
- Determine short & long term goals
- Devise ways to address barriers (systemic)
- Identify other supports
- Establish communication channels
- Clarify roles and responsibilities
(what worker needs to do & what client needs to do)
- Assist client in conducting a community mapping



DEVISING A FOLLOW UP PLAN

- Establish communication channels
- Facilitate referrals to appropriate internal and external resources
- Link up with other service providers (i.e., Host)
- Book follow up appointments while meeting with client
- Revise plan of action at every follow up contact (have goals been met?)
- Modify next steps according to client's emerging/existing needs
- Review deadlines as determined in service plan
- Identify if further advocacy is needed and how/with whom

OUTCOMES

- Effective use of resources
- Enhanced service delivery
- Appropriate referrals
- Culturally sensitive approaches
- Clients become actively involved in the process
- Can avoid unhealthy process of adaptation

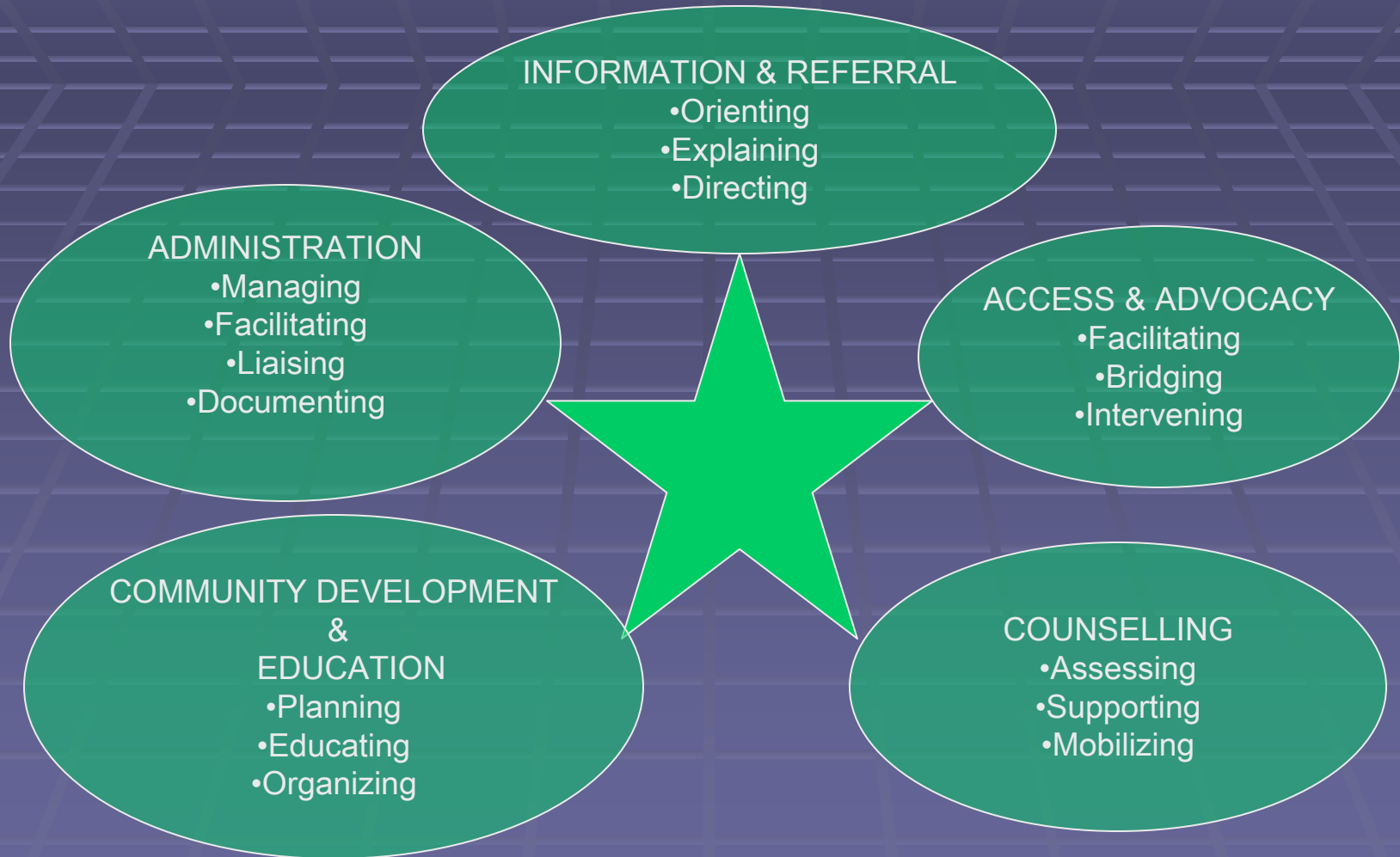
Long Term Needs that could require case manager assistance

REMEMBER, the newcomer is an adult. It is highly recommended not to undertake any action without the client's prior knowledge and consent. The integration process can take years and is an individual journey, the case manager is there to make it less difficult.

- Assistance with Financial literacy & monthly budget; rent, cheques and banking, bill payments, etc.
- Assistance with housing; search, moving, establishing
- Assistance with health; family doctor, medical checks, special health programs, trauma counselling, etc.
- Assistance with education; school registration for children, LINC, literacy, etc.
- Escort clients to first appointments
- Assist client with filing of Income Tax return
- Assist client with employment issues/research
- Assist client with completion of CIC Client Report forms and Questionnaires
- Assist client with any other identified needs
- Assist client with family reunification issues
- Assistance with referrals if contact has not already been established

REMEMBER!

FIVE FUNCTIONAL AREAS OF SETTLEMENT WORK



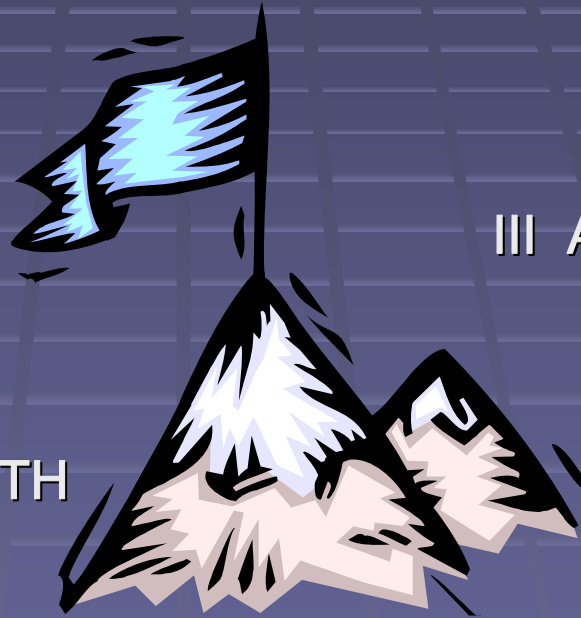
The Process of Adaptation

IV STAGE OF RECONSTRUCTION

III ADJUSTMENT TO HOST SOCIETY

II CONFRONTATION WITH HOST SOCIETY

I HONEYMOON



A Checklist for Assessing Newcomers Needs

There are several opportunities in which newcomers needs can be assessed. Consider this list as a framework to help the newcomer and your group in developing a realistic plan of action to accomplish the immediate and long-term goals of the newcomer.

CLIENT'S HISTORY

- Family composition
- Living conditions prior arrival
- Past experiences
- Process of reaching Canada
- Health
- Educational background
- Working experience prior arrival
- Orientation to Canada
- English / French level

CLIENT'S IMMEDIATE NEEDS

- Housing
- Health
- Family issues
- Food / Clothing
- Financial
- Educational concerns
- Immigration status
- Social support
(family / friends / network)

CLIENT'S LONG TERM NEEDS

- Education
- Employment
- Family reunification
- Supportive programs
- Civic participation
- Health
- Housing

THE COUNSELLOR ROLE

- Assisting the person to acknowledge her/his own strengths and skills to resolve the problem
- Providing information to help the person make informed decisions
- Providing support and guidance
- Assisting the person in prioritizing needs
- Acting as a bridge and a cultural broker between the newcomer and the host society
- Linking and enhancing the social network of the newcomer
- Monitoring, orienting, advocating newcomers and host society

INDIVIDUAL COMMUNITY MAP



School /Daycare/Adult Education

Banks



Health



Laundry



Shopping – Food/Clothes

Canada



Toronto

Government Offices



Employment/Settlement Services



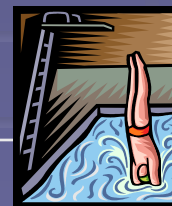
Neighbourhood



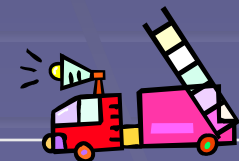
Community Legal Clinic



Places of Worship/Ethno-Specific Centres



Local Community & Recreation Centre/Library
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Local Police/Fire Department